

10 Lessons from analyzing 1 BILLION metadata items

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SALESFORCE IS STRATEGIC

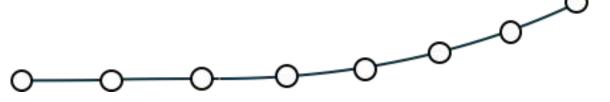


Powerful: no-code / low-code

Single source of customer data

Broad scope: Platform + AppExchange





10 Lessons > 3 Themes



SCALE/COMPLEXITY: INCREASES RISK

ORG ANALYSIS: REQUIRES X-RAY VISION

CLEAN UP: OPPORTUNITY

BENEFITS: AGILITY



10 Things from Analyzing 1 Billion Metadata Items

Blog post: bit.ly/billionSF

SCALE / COMPLEXITY = RISK

250,000 reports54,000 email templates2,000 custom objects20,000 custom fields275 record types on Account

13,000 dashboards
60 managed packages
75 Opportunity processes
12 million lines of Apex code
114 million Task records



ORG ANALYS

Discovery is k



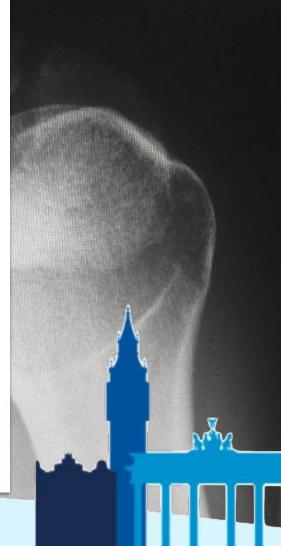




Table of contents

My Org - quick overview

Org summary for core and managed packages

Org summary trends for core and managed packages

Org Documentation for standard and custom objects

Descriptions filled

Description filled status over time

Objects and related items

Objects

Custom fields by object

Field updates by object

Process builder workflows by

object

Record types by objects

Validation rules by object

Workflow rules by object

Org Size and Usage

% filled for all fields in Object

Records by object

Custom fields by object with impact analysis

Process builder flows in objects

Reports generated through time

Email templates used through time

Salesforce Org Analytics

EXPORT TO PDF

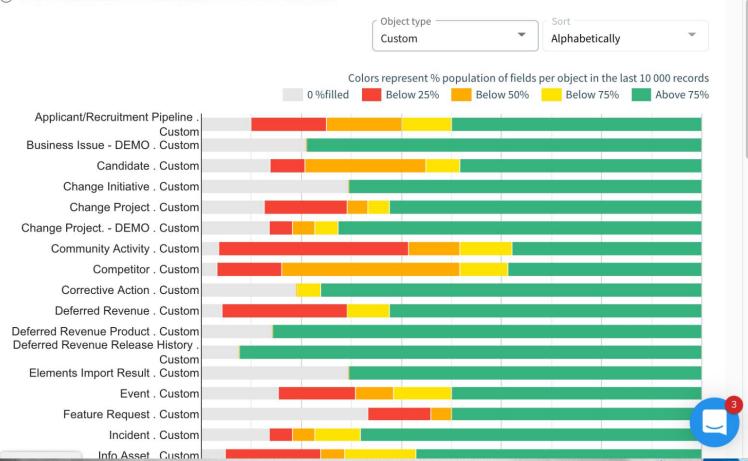


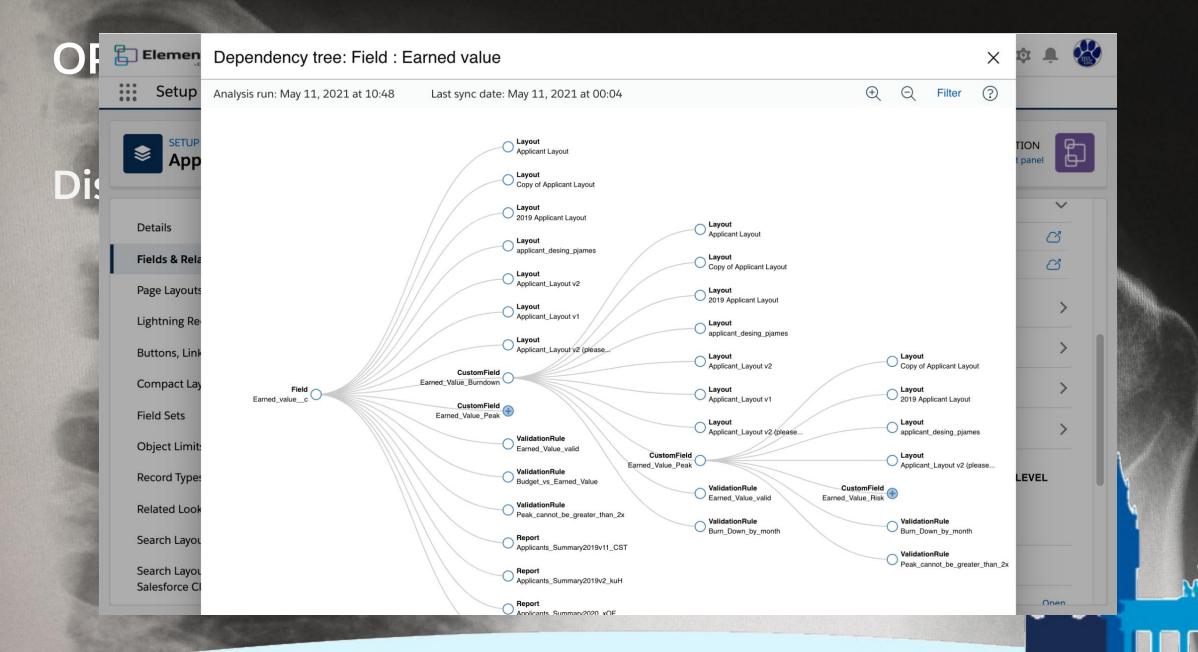




% filled for all fields in Object (based on last 10 000 records)

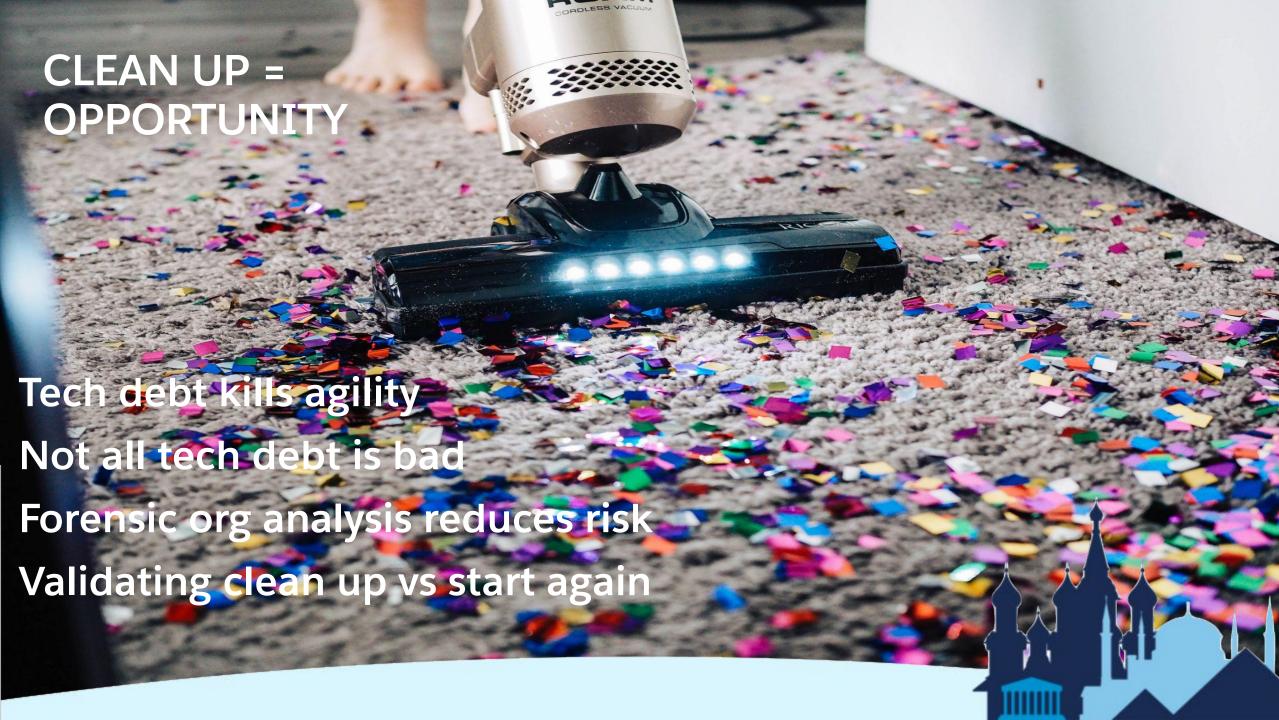
(?) Want to understand how to use this data? Click here to learn more





ORG ANALYSIS = X-RAY VISION

Discovery is key first step
Risk and priorities
Automated documentation
Limited manual documentation



KEY TAKEAWAYS



Salesforce is now strategic

Complexity of orgs can kill agility and increases risk

Org scale means automated analysis is critical

Analysis and documentation is critical, not afterthought



"Salesforce cannot be managed by spreadsheets and hope"

ACHIEVABLE NEXT STEPS

Salesforce.org UNTE Partner Summit 2021

Actions

Embed Org Discovery/Health Check in every engagement Educate customers on value of business analysis Include Org documentation as a paid deliverable



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Resources

Org Discovery Process bit.ly/orgdiscovery

Business Process Mapping course (Partner Learning Camp) bit.ly/BPMSF
10 Lessons from analyzing 7 Billion metadata items bit.ly/billionSF



